

Date: 30 October 2014

Item 8: Measuring Walking in London

This paper will be considered in public

1 Summary

- 1.1 The paper sets out the Mayor of London and Transport for London's (TfL) walking ambition and the progress being made to realise it. The paper outlines the key quantitative and qualitative methods used by TfL to measure progress towards achieving the ambition and the key trends in walking evident from these methods.

2 Recommendation

- 2.1 **The Panel is asked to note this paper.**

3 The Mayor's ambition for walking

- 3.1 In his 2010 Transport Strategy, the Mayor of London set out his ambition to coordinate the activities of TfL, the boroughs and others to deliver significant investment to improve walking conditions across London, and achieve increased levels of walking "above the current 24 per cent [walk trip] mode share". A one per cent increase was estimated to require an additional 1.1 million walk trips by 2031, against the 2006-07 baseline.
- 3.2 Currently, it is London's rising population that is driving the increase in walking levels. In particular, the rising number of walk 'journey stages' (where people walk as part of a longer journey) is fuelling the growth in overall walking observed. Walking journey stages have grown by about two million stages per day over seven years. As London's public transport network has expanded in recent years, more Londoners are walking to access these services.
- 3.3 Londoners walk more than in any other region of England, with nearly 60 per cent of people walking for 10 minutes or more at least three times per week compared to the average of 55 per cent¹ for England. Increasing walking not only relieves traffic congestion; it also leads to considerable benefits for public health. An increase in walking reduces sedentary lifestyles which can help lower common causes of obesity related deaths such as heart disease, cancer and stroke.

¹ Department for Transport Statistics (2014)

4 Key Quantitative and Qualitative Methods of Measuring the Walking Ambition

- 4.1 The dispersed nature of walking in London makes measuring and understanding the quantum of walking and participation levels a considerable challenge. TfL measures and reports on walking through a variety of quantitative and qualitative techniques, as follows:

The London Travel Demand Survey (LTDS)

- 4.2 LTDS survey data from 8,000 London households generates walking data and analysis at an aggregate level, and is reported in the Mayor's annual Travel in London (TiL) report.
- 4.3 As LTDS data is collected from residential surveys, it is limited to travel patterns of London residents only. This means that the walking trips and stages undertaken by visitors or those commuting from outside of London are not captured. To qualify the full picture of walking in London TfL also uses other data collection measures

Automatic Pedestrian Counters (APC) and manual Thames screenline counts

- 4.4 Underpinning the strategic understanding of walking provided by LTDS, TfL has access to 82 fixed APCs, used for monitoring and analysis of pedestrian flows in predominantly central London locations where pedestrian numbers are greatest.
- 4.5 APC data is supported by 31 manual Thames screenline counts that provide the data used in TfL's new walking key performance indicator (KPI). The Thames screenline counts have been chosen for the new KPI as there is already robust (annual) data extending back to 2006 for baseline analysis. The frequency of these manual counts will be increased to enrich the picture across the year. Mirroring the growth noted in LTDS, the counts show an upward trend in pedestrian numbers.

Assessing the benefits of Scheme Investment

- 4.6 TfL assesses changes in pedestrian numbers arising from street and town centre improvement schemes through site-specific counts. This data reveals localised changes following TfL and borough investment, and helps to inform future plans and scheme proposals. Scheme outcome reports are published on the Borough Extranet.

Attitudinal Surveys

- 4.7 Attitudinal surveys complement quantitative measures and TfL undertakes a range of attitudinal surveys to assess pedestrian perceptions of London walking conditions. These surveys are published through TfL's website.
- 4.8 The annual Attitudes to Walking survey provides a year on year assessment of Londoners' perceptions of the walking experience offered across the city, covering a range of factors.

4.9 The TLRN Customer Satisfaction Survey (CSS) and Streets CSS similarly provide year on year assessments of TLRN and Streets user satisfaction across a range of modes including pedestrian environments.

5 Headline Results

The London Travel Demand Survey

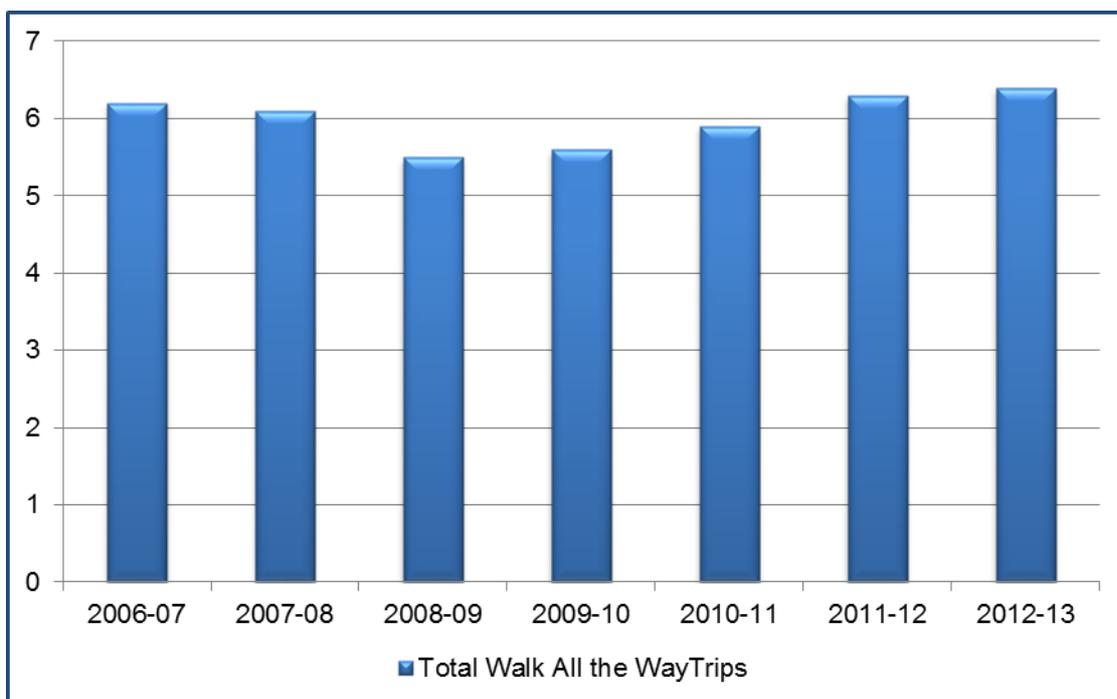
5.1 LTDS shows that 6.4 million daily 'walk all the way' trips were made out of a total of 25.9 million average daily trips in London in 2012/13, a 4.3 per cent increase compared to 2006/07. The net increase primarily reflects increased resident population, and so the mode share for walking has remained at 24 per cent of all the trips made daily in London.

5.2 However, this is not the full walking picture, as the 6.4 million walk trips represent only those 'walked all the way'. It excludes walk trips made as part of a longer distance journey using other travel modes, known as walk journey stages.

5.3 New TfL analysis of LTDS data highlights that in 2012/13 around 5.7 million walk journey stages greater than five minutes were also made as part of trips by another main mode. This represents a 64 per cent increase in the number of walk journey stages greater than five minutes since 2006/07. Five minutes is used as the cut-off as it represents a substantial walk duration that can be reliably captured in LTDS.

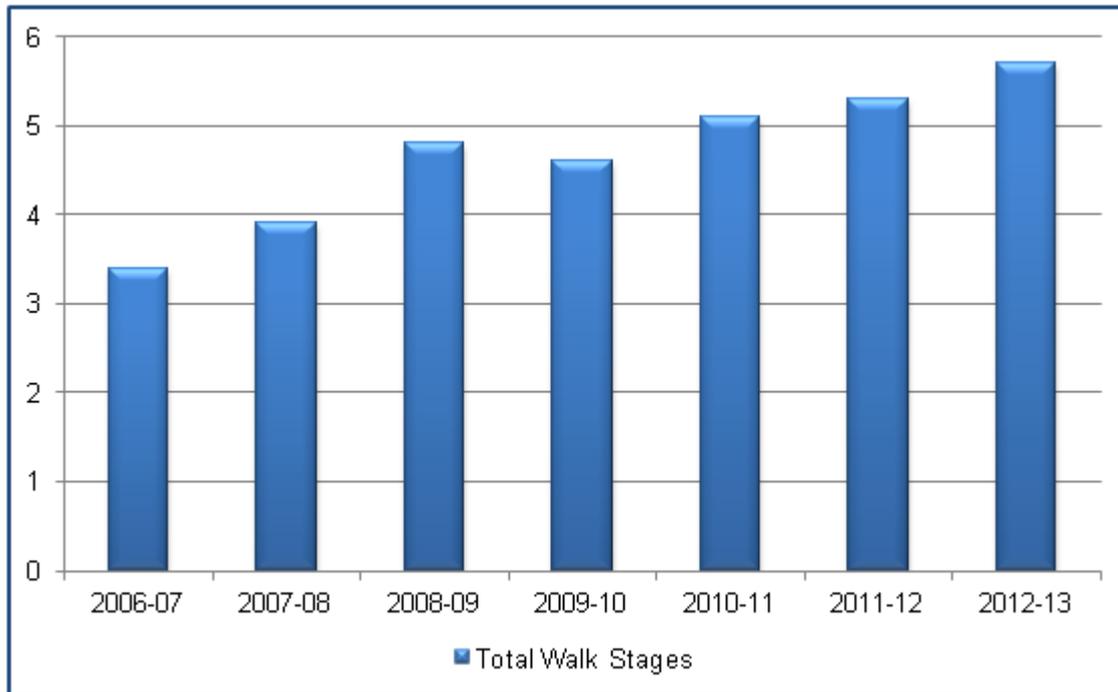
5.4 This means that a total of just over 12 million trips and journey stages were made on foot every day in London in 2012/13, an increase of over 2.5 million per day since 2006/07.

Figure 1 Total daily numbers of 'walk all the way' trips (millions)



Source: TfL Group Planning, Strategic Analysis

Figure 2 Total daily numbers of walk stages over five minutes excluding ‘walk all the way’ trips (millions)



Source: TfL Group Planning, Strategic Analysis

Automatic Pedestrian Counters and manual London Thames screenline counts

- 5.5 In addition to helping TfL understand pedestrian pressures on the road network, APC data can highlight the impact of urban realm investment. For example, TfL now sees significant seasonal differences in walk levels in parts of the City of London and Camden following public realm improvements in these areas.
- 5.6 Recent APC data in the City shows on average 53 per cent more pedestrians in summer than winter, taking advantage of the significant public realm enhancements, such as at Grants Quay Wharf, delivered in recent years. This is also a dramatic increase over previous summer walking levels in these locations.
- 5.7 TfL will report on manual Thames screenline counts for the new walking KPI on a quarterly basis from Quarter 3 of 2014/15 within the Operational and Financial Performance Report using an index to measure seasonal and year-on-year change.
- 5.8 The scale and depth of TfL’s pedestrian scheme outcome monitoring programme means it is recognised internationally as one of the most comprehensive assessment programmes for its research quality and data comparability.

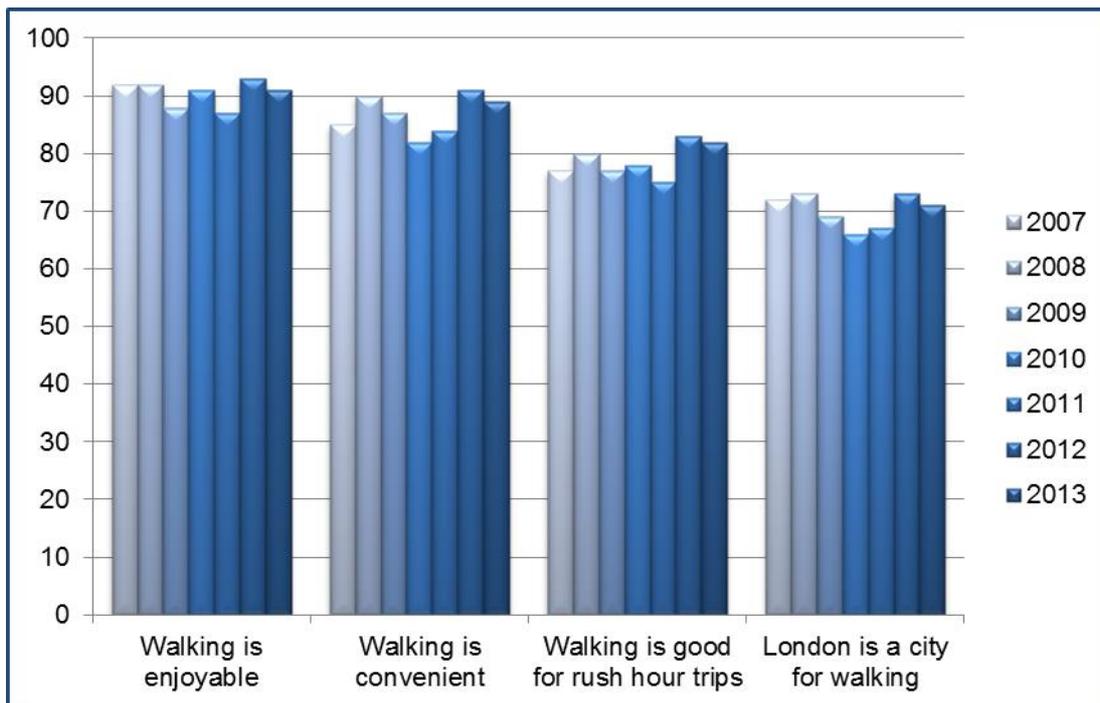
Assessing Benefits of Scheme Investment

- 5.9 Scheme-level monitoring has now been extended to include activities in public space analysis which assesses how people use space and the range of activities they undertake within these spaces. TfL is also collecting data on the user spend, land values and property prices. These new methodologies have furthered TfL's understanding of the impact of our investment.
- 5.10 Monitoring of a street renewal scheme on Long Acre, Camden, showed a 17 per cent increase in pedestrian numbers following implementation of the scheme.

Attitudinal Surveys

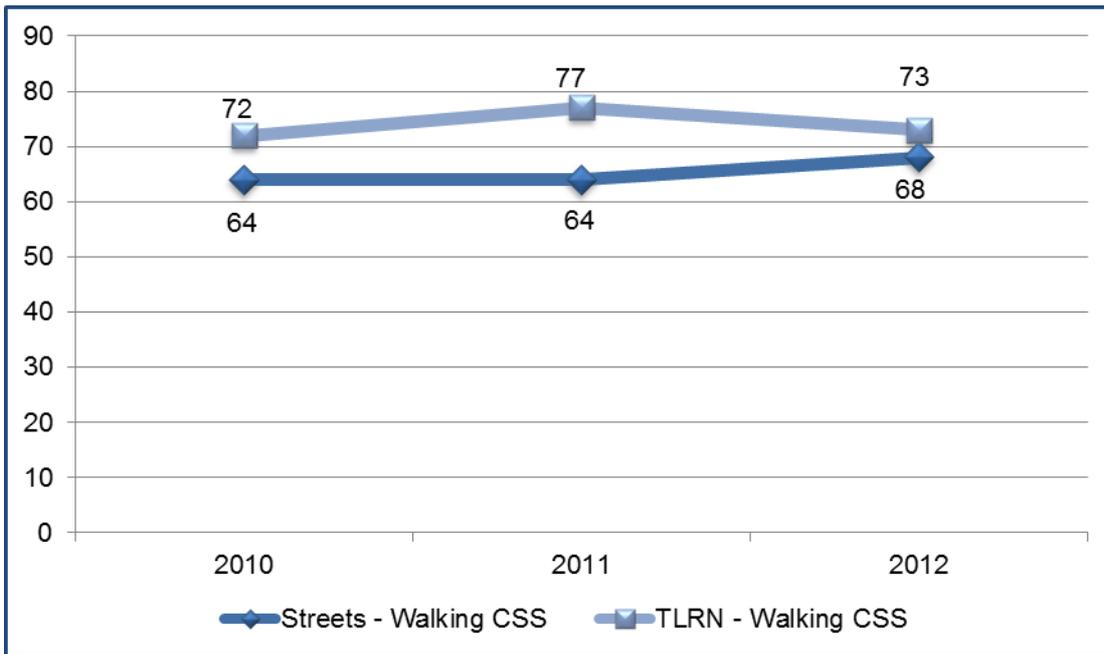
- 5.11 As the figures below illustrate, pedestrian perception scores across all the qualitative surveys do not vary significantly from year to year. Changes observed are small and incremental, though a noticeable uplift in 2012 may reflect the significant investment in public realm and street cleaning for the London 2012 Games.

Figure 3 Selected Attitudes to Walking factor trends 2007-2013 (%)



Source: TfL Surface Strategy & Planning, Strategy & Outcome Planning

Figure 4 TLRN and Streets CSS Walking Satisfaction 2010 – 2012 (mean scores)



Source: TfL Surface Strategy & Planning, Strategy & Outcome Planning

6 Future Measurement

- 6.1 TfL is developing and testing new methodologies that could support enhanced monitoring of walking from 2015/16 and better inform our investment strategy in future.
- 6.2 Interrogating LTDS has already yielded the new walk stages data presented in this paper. We are continuing to explore what additional aggregated walking information the LTDS data sets can provide.
- 6.3 New technology will play an increasingly important role in counting walking levels. Mobile phone signals (used as a proxy for pedestrian density), Bluetooth cordon counts, fish-eye camera technologies and street-level monitoring using Split Cycle Offset Optimisation Technique could in time provide cost-effective ways of measuring pedestrian movement in London.
- 6.4 TfL is committed to providing more data and information through open source formats and will look into how walk count data can be made available in this way to enable third party analysis.
- 6.5 All of this information is used to continue to improve our understanding of when, where and why people walk, to enable TfL to better serve pedestrians in the capital.

List of appendices to this report:

None

List of Background papers:

None

Contact Officer: Leon Daniels, Managing Director, Surface Transport

Number: 020 3054 0180

Email: Leondaniels@tfl.gov.uk